

in their younger years. This process is likely to continue for several decades, until rock fans dominate the adult population.

The popularity of jazz, classical music, show tunes, and even opera has also increased significantly. This is clear evidence that young people's musical tastes evolve as they grow older. Comparisons across surveys within specific birth-year groups show that baby boomers are becoming distinctly more positive about classical music and jazz as they move from their 30s to their 40s. Yet the current generation of young adults may not follow this pattern. Due to changing trends in public education, baby busters had less exposure than boomers to music-appreciation classes in school. As a result, there is no guarantee that baby busters will undergo a similar transformation when they reach middle age.

The most puzzling trend in music preferences is a six-point decline in the percentage of adults who say they like coun-

Baby boomers are becoming distinctly more positive about classical music and jazz as they move from their 30s to their 40s.

try/western music. This seems to contradict recording-industry figures showing marked increases in sales of country music over the last five years. Sales of country recordings have grown almost threefold, from 7 percent of the total dollar volume of prerecorded music sales in 1989 to nearly 18 percent in 1993. How can the NEA data show a decline in popularity?

Some of the shrinkage in the proportion of adults who like country music could be attributed to the increase in average educational attainment over the last decade, because of the negative correlation between education levels and the preference for country. And even while the

percentage of adults who say they like country has declined over the last decade, the absolute number of country fans has increased from 95 million to 96 million because of overall population growth.

The number of people who like country music is so large that a small increase in the number of recordings each fan purchases per year would produce a huge increase in sales. More spending by country fans could easily overwhelm the slight decline in share. This may explain most of the gap, because recording-industry data show that the middle-aged are a growing segment of the market for recorded music. Older buyers are considerably more likely than young adults or teenagers to be country-music fans.

MUSICAL VARIETY

The NEA survey also raises an interesting question: why aren't there more musical variety shows? The data show that most Americans like several different kinds of music, but broadcasting has been moving toward increased market segmentation. Most radio stations play only a single form of music; a few stations play different music in different time slots. By narrowing their musical offerings, broadcasters hope to deliver an audience with known and desirable demographic characteristics to advertisers.

An unfortunate consequence of this trend is that people have fewer opportunities to broaden their musical horizons. Teenagers watch MTV, while senior citizens watch reruns of the "Lawrence Welk Show," and each group has minimal exposure to the music of the other. To compound this problem, relatively few children today take music-appreciation classes. The result is that many young people are growing up unaware of America's rich musical legacy.

Once upon a time, Ed Sullivan managed to bring Elvis Presley and Isaac Stern together on the same top-rated television show. Today, the logic of market segmentation makes such a program

THEME AND VARIATIONS

Men groove to blues, rock, and jazz. Women dominate the audience for easy-listening music, opera, and musicals.

(percent of adults who like selected types of music by sex, race, age, education, and income, 1992)



all but impossible to support commercially. Yet the data show that average Americans appreciate many forms of music. Advertiser assumptions about musical tastes may be wrong.

There are now signs that the public is ready for an end to musical segregation. Music fans in their 20s are passionate about hard rockers like Pearl Jam and Soundgarden—but they are also partially responsible for the comeback of aging crooners like Tony Bennett and Frank

	Country/ Western	Mood/ Easy Listening	Rock	Blues/ Rhythm & Blues	Big Band	Jazz	Classical	Show Tunes/ Operettas/ Musicals	Contemporary Folk	Opera
TOTAL	51.7%	48.8%	43.5%	40.4%	35.0%	34.2%	33.6%	27.8%	23.1%	12.6%
SEX										
Men	52	44	48	44	34	38	32	24	23	10
Women	52	53	39	37	36	30	35	31	23	14
RACE										
White	57	50	46	38	37	32	35	30	24	13
Black	19	39	23	59	22	54	18	15	15	8
Other	32	42	38	25	17	26	36	20	18	14
AGE										
18 to 24	39	38	70	39	13	30	24	14	10	5
25 to 34	50	47	59	46	23	41	27	21	19	7
35 to 44	53	52	57	46	30	39	36	25	27	10
45 to 54	61	54	39	40	43	33	39	35	32	16
55 to 64	58	54	14	35	53	30	42	37	26	20
65 to 74	54	55	9	35	61	27	43	42	26	21
75 to 96	46	36	7	23	46	21	29	27	14	17
EDUCATION										
Grade school	48	22	12	14	19	10	12	7	9	6
Some high school	59	31	27	26	24	15	16	12	13	5
High school graduate	57	49	42	36	32	28	25	22	20	9
Some college	50	56	54	50	37	42	39	33	25	14
College graduate	42	56	54	50	43	50	51	39	28	16
Graduate school	46	60	53	59	53	54	65	52	40	26
FAMILY INCOME										
Under \$5,000	43	32	36	35	16	27	20	14	11	6
\$5,000 to \$9,999	52	36	32	30	27	21	23	14	17	7
\$10,000 to \$14,999	55	35	33	34	30	25	25	19	18	12
\$15,000 to \$24,999	57	43	39	35	31	29	29	23	19	9
\$25,000 to \$49,999	54	56	50	43	38	36	35	29	26	13
\$50,000 or more	48	62	55	52	45	47	47	44	31	17
Not ascertained	42	46	35	36	37	35	35	29	20	13

Note: In 1992, U.S. population aged 18 and older was 186 million.

Source: Authors' tabulations of National Endowment for the Arts survey, 1992

Sinatra. Paul Simon, Peter Gabriel, and other stars have made their mark in the 1990s with multi-platinum recordings that mix rock with African and Latin rhythms. Earlier this year, blues legend B. B. King even played at the grand opening of the Hard Rock Cafe in Beijing.

The NEA data give broadcasters and other businesses a rare opportunity to re-evaluate their assumptions. By serving the same diet of music to audiences over and over again, businesses may be try-

ing to exploit group differences that are no longer significant. Americans' musical preferences are full of cohort chasms, but many listeners will cross over them whenever someone builds a bridge. •

TAKING IT FURTHER

The 1992 Survey of Public Participation in the Arts interviewed a national sample of 5,789 adults aged 18 and older about their musical preferences. The interviews

were conducted in July through December of 1992. About three-quarters of the interviews were conducted by telephone and one-quarter in person. The response rate was over 80 percent. These results are compared with similar questions in the 1982 and 1985 Surveys of Public Participation in the Arts, which interviewed 5,617 and 2,151 adults, respectively. For information about reports on the surveys and copies of public-use data files, contact the Research Division, National Endowment for the Arts, 1100 Pennsylvania Avenue, NW, Washington, DC 20506; telephone (202) 682-5432.

M Street commercial station format data produces the following information

Large Markets Vs. Small Markets

Counts as of September 1994

Primary Format		Total	Arbitron		Not		Arbitron Markets		Total	%	RTG	Non-Arbitron Markets		Total	%
1	Country	2,642	846	32%	68%	1,796	1	Country	846	16.3%	12.7%	1	Country	1,796	36.8%
2	Adult Contemporary	1,197	420	35%	65%	777	2	News, Talk	622	12.0%	12.4%	2	Adult Contemporary	777	15.9%
3	News, Talk	923	622	67%	33%	301	3	Adult Contemporary	420	8.1%	6.6%	3	Oldies	348	7.1%
4	Oldies	714	366	51%	49%	348	4	Oldies	366	7.1%	5.5%	4	News, Talk	301	6.2%
5	Adult Standards	435	277	64%	36%	158	5	Religion (Teaching, Variety)	299	5.8%	0.6%	5	Soft Adult Contemporary	177	3.6%
6	Religion (Teaching, Variety)	426	299	70%	30%	127	6	Adult Standards	277	5.4%	3.1%	6	Adult Standards	158	3.2%
7	Spanish	401	243	61%	39%	158	7	Rock	260	5.0%	7.0%	7	Spanish	158	3.2%
8	Top-40 (CHR)	358	236	66%	34%	122	8	Spanish	243	4.7%	3.7%	8	Religion (Teaching, Variety)	127	2.6%
9	Soft Adult Contemporary	345	168	49%	51%	177	9	Top-40 (CHR)	236	4.6%	6.4%	9	Top-40 (CHR)	122	2.5%
10	Rock	309	260	84%	16%	49	10	Classic Rock	173	3.3%	2.0%	10	Southern Gospel	118	2.4%
11	Classic Rock	264	173	66%	34%	91	11	Soft Adult Contemporary	168	3.2%	4.5%	11	Adult Hits	113	2.3%
12	Adult Hits	242	129	53%	47%	113	12	Urban, R&B	152	2.9%	6.1%	12	Classic Rock	91	1.9%
13	Southern Gospel	204	86	42%	58%	118	13	Adult Hits	129	2.5%	3.5%	13	Urban, R&B	51	1.0%
14	Urban, R&B	203	152	75%	25%	51	14	Black Gospel	100	1.9%	1.3%	14	Rock	49	1.0%
15	Contemporary Christian	125	88	70%	30%	37	15	Sports	96	1.9%	1.2%	15	Variety	49	1.0%
16	Black Gospel	122	100	82%	18%	22	16	Contemporary Christian	88	1.7%	1.8%	16	Easy Listening	40	0.8%
17	Easy Listening	106	66	62%	38%	40	17	Southern Gospel	86	1.7%	0.1%	17	Contemporary Christian	37	0.8%
18	Sports	106	96	91%	9%	10	18	Urban AC	74	1.4%	1.0%	18	Alternative rock	33	0.7%
19	Alternative rock	94	61	65%	35%	33	19	Easy Listening	66	1.3%	0.6%	19	Gospel	31	0.6%
20	Urban AC	86	74	86%	14%	12	20	Alternative rock	61	1.2%	1.1%	20	Black Gospel	22	0.5%
21	Ethnic	69	60	87%	13%	9	21	Ethnic	60	1.2%	0.3%	21	Urban AC	12	0.2%
22	Variety	63	14	22%	78%	49	22	New Rock	51	1.0%	1.9%	22	Sports	10	0.2%
23	New Rock	54	51	94%	6%	3	23	Classical, Fine Arts	41	0.8%	1.2%	23	Ethnic	9	0.2%
24	Gospel	49	18	37%	63%	31	24	Jazz	40	0.8%	1.5%	24	R&B oldies	7	0.1%
25	Classical, Fine Arts	44	41	93%	7%	3	25	R&B oldies	32	0.6%	0.3%	25	New Rock	3	0.1%
26	Jazz	43	40	93%	7%	3	26	Gospel	18	0.3%	0.0%	26	Classical, Fine Arts	3	0.1%
27	R&B oldies	39	32	82%	18%	7	27	Pre-Teen	18	0.3%	0.1%	27	Jazz	3	0.1%
28	Pre-Teen	19	18	95%	5%	1	28	Variety	14	0.3%	0.1%	28	Pre-Teen	1	0.0%
	not available or changing	6	4	67%	33%	2		not available or changing	4	0.1%	0.1%		not available or changing	2	0.0%
	Silent	369	137	37%	63%	232		Silent	137	2.6%			Silent	232	4.8%
Total stations		10,057	5,177	51%	49%	4,880	Total stations		5,177			Total stations		4,880	

RTG = Arbitron 6am to 12 midnight average quarter hour percent, based on all markets Spring 1994
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**ENGINEERING STATEMENT
IN SUPPORT OF AN APPLICATION
FOR SATELLITE DIGITAL AUDIO
RADIO SERVICE
PRIMOSPHERE LIMITED PARTNERSHIP**

This engineering statement was prepared on behalf of Primosphere Limited Partnership (Primosphere), applicant for a new satellite digital audio radio service. Aside from the obvious benefit of such a nationwide service, implementation of the Primosphere proposal would provide high quality aural service to millions of Americans currently unserved or underserved by FM stations. This statement presents data on the areas and populations that would receive improved aural service through implementation of the Primosphere proposal and describes the methodology used to obtain that data.

Findings

Table I provides information on the number of FM services provided in the continental United States by population and area. This table illustrates that substantial numbers of Americans inhabiting a large portion of the continental U.S. do not receive many choices of high quality aural service. For example, almost twenty-two million Americans in roughly three million square kilometers are served by five or fewer FM stations.

Primosphere proposes to provide the entire continental United States and virtually the total U.S. population with a satellite digital audio radio service comprised of twenty-three near CD-quality stereo music channels and six non-music channels, thereby vastly expanding the American public's over-the-air programming choices. Of particular note, implementation of the Primosphere proposal would provide 722,102 persons in 823,578 square kilometers with their first high quality aural service, and 1,685,343 persons in 523,387 square kilometers with an alternative to the one FM service now provided.

<u>Number of FM Services</u>	<u>Population</u> (1990 Census)	<u>Area</u> (km ²)
0	722,102	823,578
1	1,685,343	523,387
2	2,640,808	445,951
3	4,076,882	442,549
4	5,539,120	408,902
5	7,137,500	413,141
6	7,877,112	395,253
7	9,038,569	358,400
8	9,409,414	303,545
9	9,166,990	266,633
10 or more	189,456,006	1,255,723
Total U.S.	246,749,846	5,637,062

Table I Number of FM Services by Population and Area

Methodology

The population, areas, and number of FM services reported herein were determined in the following manner. A FM station database¹ was culled to prevent any station from being counted more than once. Pending applications for new or existing facilities were not included in the culled database, nor were the licensed facilities of existing stations with granted construction permits. Thus, the culled database contained only one record for each authorized FM facility in the continental United States. Due to its size, a printed copy of the culled database has not been included herein. However, a copy is available and will be provided to the FCC upon request.

¹ The FM station database used in preparing this statement is that maintained by Dataworld, Inc., of Bethesda, Maryland, and was updated on or about December 1, 1992.

The area enclosed by the 60 dBu (1 millivolt per meter), F(50,50) contour for every FM station contained in the culled FM station database was calculated taking into account each station's antenna radiation center heights above average terrain along 72 evenly spaced (every five degrees) radials and authorized effective radiated power (ERP). Heights above average terrain were computed using the standard FCC methodology and terrain data extracted from the National Geophysical Data Center 30-second terrain elevation database. If a station employed a directional antenna, and the horizontal plane radiation characteristics for the station's antenna were available in the directional antenna database, then the ERP for the station was adjusted for the directional radiation characteristics of the antenna. The geographic area enclosed by the station's 60 dBu contour was then stored in a new database, and this process was repeated until this database contained coverage area data for every station in the culled FM station database.

To facilitate the enumeration of FM services and population as well as measurement of area served, the area within the continental United States was computer modeled by means of a multidimensional array. Each element of the array represented a geographic area two minutes square. All records from the FM coverage database were individually applied to the appropriate elements of the array using an algorithm which computed the number of services, population, and area for each element based on the geographic area represented by that element and the geographic coverage area of the station being evaluated. Data from this array were then processed to obtain the population and area data of Table I.

I declare under penalty of perjury that the foregoing is true and correct. Executed on December 14, 1992.

A handwritten signature in black ink, appearing to read 'Robert W. Denny, Jr.', with a stylized flourish at the end.

Robert W. Denny, Jr., P.E.

Stations with primarily non-original program origination

Markets 1 to 50 (approx. population 121,844,500)

On-air Stations	Type	Network	%	simulcast	%	total	%	Off Air Stations
2044	All	228	11%	98	5%	326	16%	31
860	AM	172	20%	79	9%	251	29%	22
1184	FM	56	5%	19	2%	75	6%	9

Markets 51 to 100 (approx. population 29,412,900)

1349	All	221	16%	91	7%	312	23%	57
544	AM	136	25%	60	11%	196	36%	41
805	FM	85	11%	31	4%	116	14%	16

Markets 101 to 263 (approx. population 34,283,600)

2811	All	577	21%	208	7%	785	28%	66
965	AM	326	34%	122	13%	448	46%	41
1846	FM	251	14%	86	5%	337	18%	25

M Street Markets that are not included in Arbitron Markets (approx. population 16,848,200)

1256	All	294	23%	105	8%	399	32%	38
497	AM	159	32%	58	12%	217	44%	26
759	FM	135	18%	47	6%	182	24%	12

Stations not in a market (approx. population 50,000,000)

4108	All	977	24%	538	13%	1515	37%	216
1822	AM	451	25%	410	23%	861	47%	146
2286	FM	526	23%	128	6%	654	29%	70

Total all stations (approx. population 252,389,200)

11568	All	2297	20%	1040	9%	3337	29%	408
4688	AM	1244	27%	729	16%	1973	42%	276
6880	FM	1053	15%	311	5%	1364	20%	132

Network indicates approximately 80% or better of programming is network in origin

Simulcast indicates approximately 80% or better of programming is originating from another station

Stations are only counted once, simulcast would take precedence over network

Population is the 2+ population for The M Street Radio Markets

Source M Street Radio Database

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M Street format data produces the following format information:

Counts as of September 1994

Primary Format		Total	Commercial	Non-Comm.	% AM	% FM	Simulcast		Network	
1	Country	2,648	2,642	6	41%	59%	402	15%	498	19%
2	Adult Contemporary	1,215	1,197	18	33%	67%	102	8%	243	20%
3	News, Talk	1,168	923	245	77%	23%	81	7%	449	38%
4	Religion (Teaching, Variety)	784	426	358	46%	54%	55	7%	78	10%
5	Oldies	716	714	2	41%	59%	56	8%	247	34%
6	Variety	444	63	381	15%	85%	28	6%	-	-
7	Adult Standards	437	435	2	87%	13%	21	5%	258	59%
8	Spanish	433	401	32	66%	34%	34	8%	9	2%
9	Top-40 (CHR)	415	358	57	5%	95%	20	5%	1	0%
10	Alternative rock	370	94	276	3%	97%	16	4%	-	-
11	Soft Adult Contemporary	346	345	1	31%	69%	27	8%	104	30%
12	Rock	319	309	10	7%	93%	30	9%	17	5%
13	Classical, Fine Arts	283	44	239	4%	96%	60	21%	34	12%
14	Classic Rock	267	264	3	3%	97%	17	6%	58	22%
15	Adult Hits	243	242	1	7%	93%	14	6%	35	14%
16	Urban, R&B	234	203	31	31%	69%	12	5%	-	-
17	Southern Gospel	216	204	12	78%	22%	14	6%	43	20%
18	Contemporary Christian	216	125	91	20%	80%	17	8%	41	19%
19	Black Gospel	124	122	2	91%	9%	-	-	2	2%
20	Jazz	119	43	76	6%	94%	6	5%	1	1%
21	Easy Listening	115	106	9	22%	78%	9	8%	19	17%
22	Sports	106	106		97%	3%	4	4%	79	75%
23	Urban AC	87	86	1	29%	71%	5	6%	36	41%
24	Ethnic	79	69	10	72%	28%	5	6%	-	-
25	Gospel	59	49	10	78%	22%	2	3%	1	2%
26	New Rock	54	54		9%	91%	4	7%	4	7%
27	R&B oldies	39	39		95%	5%	-	-	21	54%
28	Pre-Teen	19	19		84%	16%	2	11%	15	79%
	not available or changing	10	6	4	10%	90%				
Total operating stations		11,565	9,688	1,877	40%	60%	1043	9%	2293	20%
Stations off the air		409	(277 AM and 132 FM)		68%	32%				
Construction permits		673	(88 AM and 585 FM)		13%	87%				
Total stations and CP's		12,647			40%	60%				

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Stations are counted in their primary format only.

Simulcast and Network totals are for stations with a primary Simulcast or Network programming source.



by Cliff Berkowitz

Rescuing Small Market Radio

CPR for the Heartbeat of America

Most of what we read about in the trades revolves around major market Radio. Major market Radio is exciting, but the majority of Radio stations across the United States is in small markets. I never gave much thought to small market Radio until I moved to a small market last year. I've discovered this is the true heartbeat of Radio. Unfortunately I feel like a man who discovered the wondrous buffalo as the last of them was being herded over a cliff.

Operating at full potential, small market Radio is magic. Life in a small community can be wonderful. The daily, frenetic march and stress of city life give way to a more humane pace. Cool distance between strangers is replaced with open friendliness. And being somewhat isolated from the rest of the world, these communities develop their own distinct culture and activities. Smart operators in these markets reflect this on the air by becoming the voice of the local culture and intertwining with the very fabric of the community.

Driven to Extinction

This kind of Radio is rapidly disappearing from the American landscape. Much like the buffalo, these icons of American history are being driven to extinction, and we are to blame. Small markets have become addicted to 24-hour, satellite-delivered programming. They have replaced local voice and community involvement with factoids from *USA Today* and generic voices that don't even tell us the time. I realize that satellite Radio has saved the economic bacon of many a broadcaster, but we are leaning on this crutch far too much.

At this point you may be asking yourself, "What does this have to do with promotions?" In a word: everything. Promotions can demonstrate to your listeners what you stand for, what you're all about, and what you're up to. Becoming part of the fabric of your community and getting involved in its activities is the best promotion a Radio station from a small market (or any size market for that matter) can do.

Homogenized Culture

Once you make the commitment to being a real local Radio station, act like it. Too many small market Radio operators try to make their stations sound "major market." Truth be known, most of the best major market stations sound like good small market Radio by keying into the community as best they can. Generic liners that don't mean anything to anybody and big voice drop-ins rob your station of its local identity by homogenizing it to sound like Anywhere, U.S.A.

Remember, your market is special, and you've got something major market stations wish they had: the opportunity to connect with the audience. As a strong local station you can be in the center of everything of importance to the community. Know what's going on and talk about it. Get out and be with people whenever possible — not just at sales remotes. Put local figures on the air regularly — not just the local celebrities and public figures, but interesting, everyday folks, too. This is your community, and your station should be a mirror of it. Celebrate what makes your market different from the rest of the world and extol its virtues.

With so many good, small market

QUICK REFS

- Most Radio stations across America are in small markets.
- Satellite Radio has gutted the soul and substance of small market Radio.
- Generic liners that don't mean anything to anybody and big voice drop-ins rob your station of its local identity.
- Promotions are more than contests. They can define not only a Radio station but a community by becoming the voice of the local culture and intertwining with its very fabric.
- Celebrate what makes your market different from the rest.

stations gone, the few remaining really stand out. And while the herds have thinned significantly over the years, I remain hopeful for the future of small market Radio. After all, the buffalo are making a comeback, too.

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